TIME MANAGEMENT

TABLE OF CONTENTS

1 GENERAL OVERVIEW 3
2 ICONS OVERVIEW 3
3 TIME PROCESSING 4
4 TIME DATA 5
5 OVERTIME AUTHORIZATION 6
6 EMPLOYEE DATA 7
7 TIME CONFIGURATION 8
8 REPORTS 9
8.1 TIME ERRORS REPORT 11
8.2 ABSENTEEISM REPORT 12
8.3 CLOCKDATA REPORT 13
8.4 FILO VS. ACTUAL HRS REPORT 14
8.5 AUTHORIZED OVERTIME REPORT 15
8.6 TIME SHEET REPORT 16
8.7 PERIOD RESULTS REPORT 17
8.8 24 HOUR ABSENTEEISM 18
9 ACTA OVERVIEW 19

1 GENERAL OVERVIEW

The Time Management system is used to calculate employee time results, do time corrections and authorize overtime. An added module can be purchased to enable time administrators to capture employee leave, and maintain public holidays. When using the added module, Public holidays and Employee Leave hours are included when calculating period end totals.

Time evaluation can be run for different companies, and can be sub-divided into work areas, if required.
Depending on the implementation, one of the following calculation methods can be used:

- Actual clocking records,
- Only use First clock in and Last clock out,
- Flexi Time.

It is important to remember that all Overtime, Employee Leave and Public Holidays must be captured before the Time Calculation process is activated. If this is not the case, the results generated will be incorrect.

2 ICONS OVERVIEW

Please note that Icons are based on windows XP and may thus vary from other operating systems.

ICON	KEY WORDS	DESCRIPTION
	Activate	Activate Time Evaluation
	Add	Add Employee to List / Overtime / New Time Row
	Assign	Assign Group Overtime
	Create	Create Payroll Data File
	Delete	Delete Time Data row
	Exit	Exit to previous level
	Preview	Preview Time sheet
	Print	Print Time sheet
	Reports	Run Reports
	Save	Save Record
	Search	Search for record
	Stop	Stop Processing

3 TIME PROCESSING

Procedures

On the Time Processing screen one can:

- Select an employee or employees for which time evaluation should be run.
- Employees can be searched for by using either the Company ID or Surname as search criteria.
- Time evaluation can be run per selected Employer (Company Code) and per Work Area, if required.
- The date for the Time Evaluation period must be selected. Dates are always in (yyyy-mm-dd) format.
- The Reports dialogue can be opened by selecting the icon from this screen. Once an employee is selected, it is suggested that the reports should only be used after the time evaluation process has been completed at least once for the period.

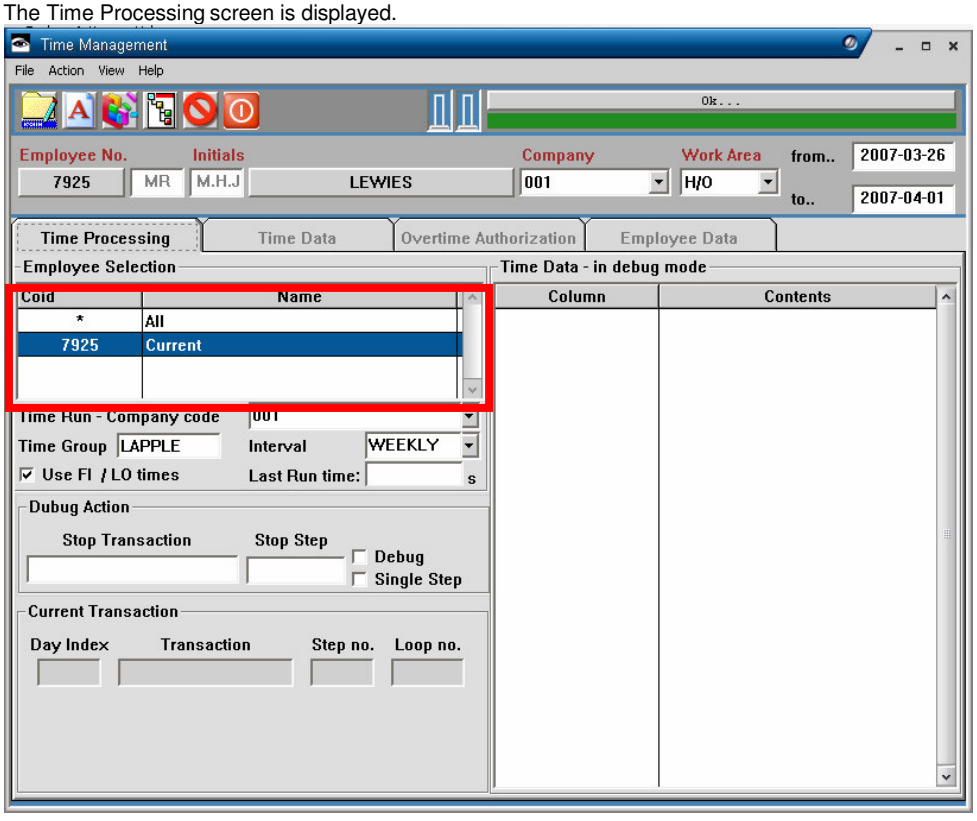
Menu Path

Follow the procedure below to run Time Evaluation:

- Click in the Employee No. field and type in the employee's company ID (COID) or click in the SURNAME field and type the employee's surname.
- Select the Company and Work area/s, if you have sufficient access and click the search button.
- Run Time evaluation for only one employee by selecting the "Add Employee to list" button using the icon. Remove or clear the Employee selection list by right clicking on the area marked in **red**, and selecting "Clear selected from list".
- Select the activate button from the button bar and allow enough time for time processing to complete (on average 3 seconds per employee).
- After the time evaluation process is complete, the Time Data tab is automatically selected.
- If you have sufficient access and once it is configured, you can create the payroll export file by selecting the Create payroll export file icon.

Initial Screen

The Time Processing screen is displayed.



4 TIME DATA

Procedures

On this page one can:

- Correct Time Errors (Employee has not clocked in or out).
- Delete unwanted time records.
- View the amount of hours worked per day.
- View Normal Time, Afternoon Shift, Overtime, Premium Time, Sunday Time, Holiday Time and Absent Time for the selected employee.
- Print the Time sheet for a selected employee

Menu Path

Follow the procedure below to Correct Time Errors:

- Select the row to rectify.
- Fill in all the correct data.
- Select the Save icon from the button bar.
- Select the row to Delete, select the Delete icon
- Select the Save icon from the button bar.

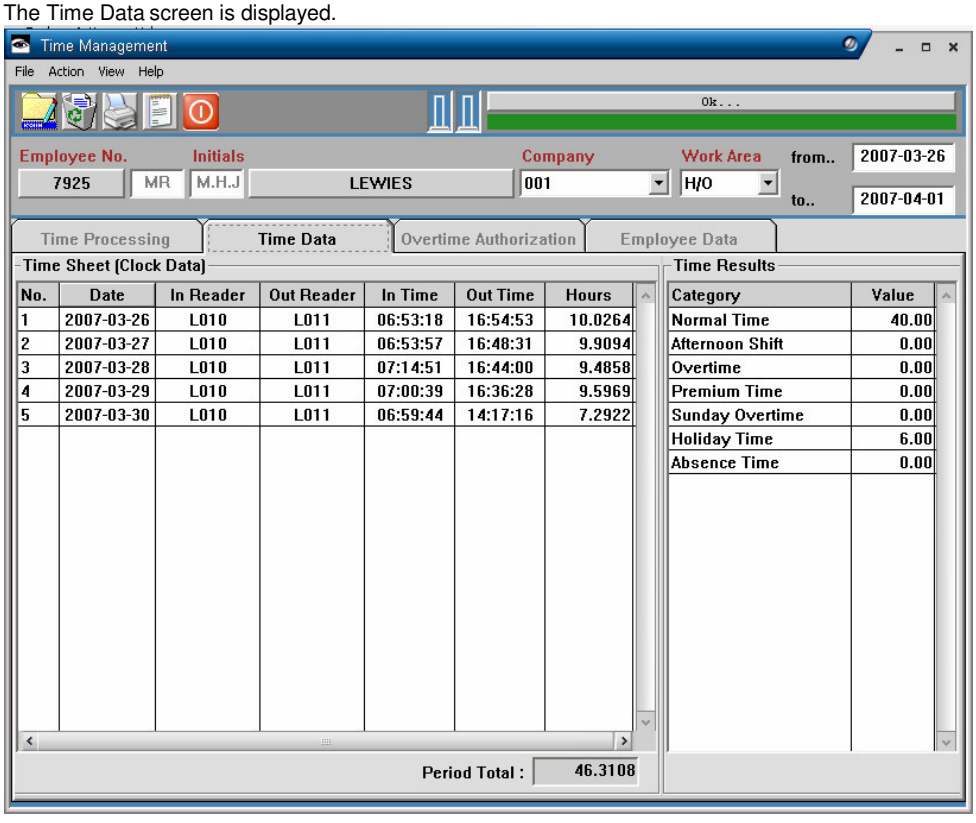
Menu Path

Follow the procedure below to Print Time sheets:

- Select the Print button from the button bar.

Initial Screen

The Time Data screen is displayed.



5 OVERTIME AUTHORIZATION

Procedures

On this page one can:

- Authorize overtime for a specific employee for any Date required.
- Add or Delete overtime as needed.

Menu Path

Follow the procedure below to Authorize overtime:
Adding a record:

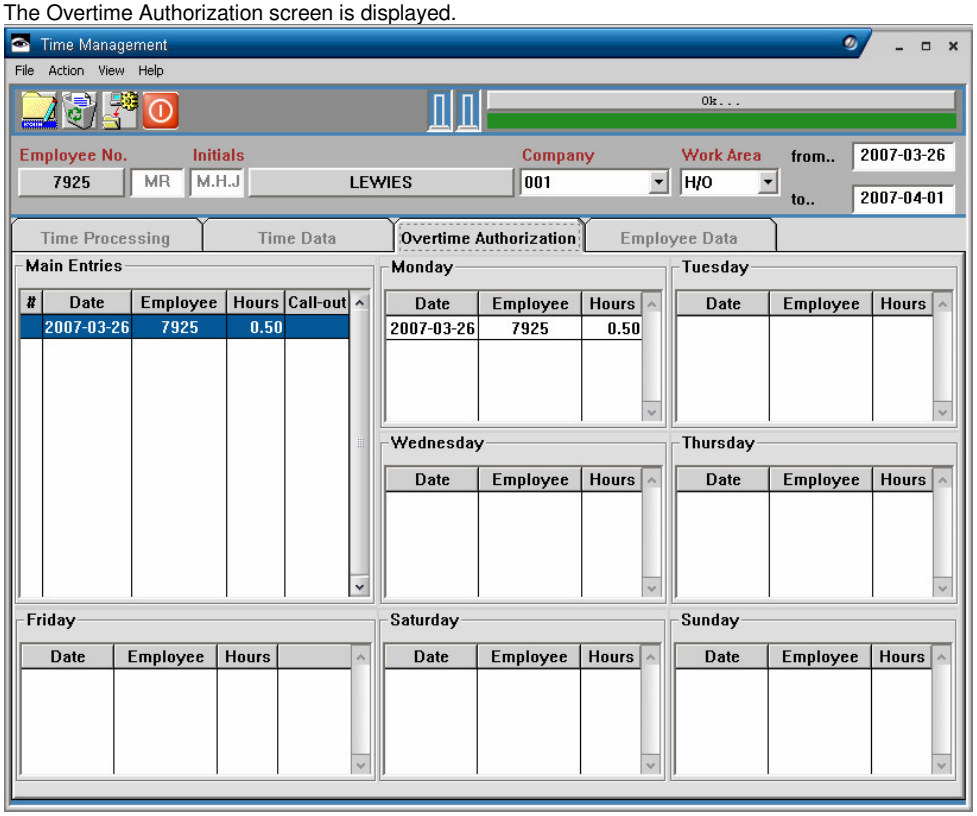
- Select the Add icon from the button bar.
- Fill the date required and the amount of overtime hours worked.
- Select the save icon.

Deleting a record:

- Click on the # Column to select the entire row.
- Select the Delete Icon.
- Select the Save icon.

Initial Screen

The Overtime Authorization screen is displayed.



6 EMPLOYEE DATA

Procedures

On this page one can:

- Maintain Employee data if needed (normally employee data is downloaded from the customer's Payroll System i.e. VIP, SAP).
- Verify if the employee's data is correct.

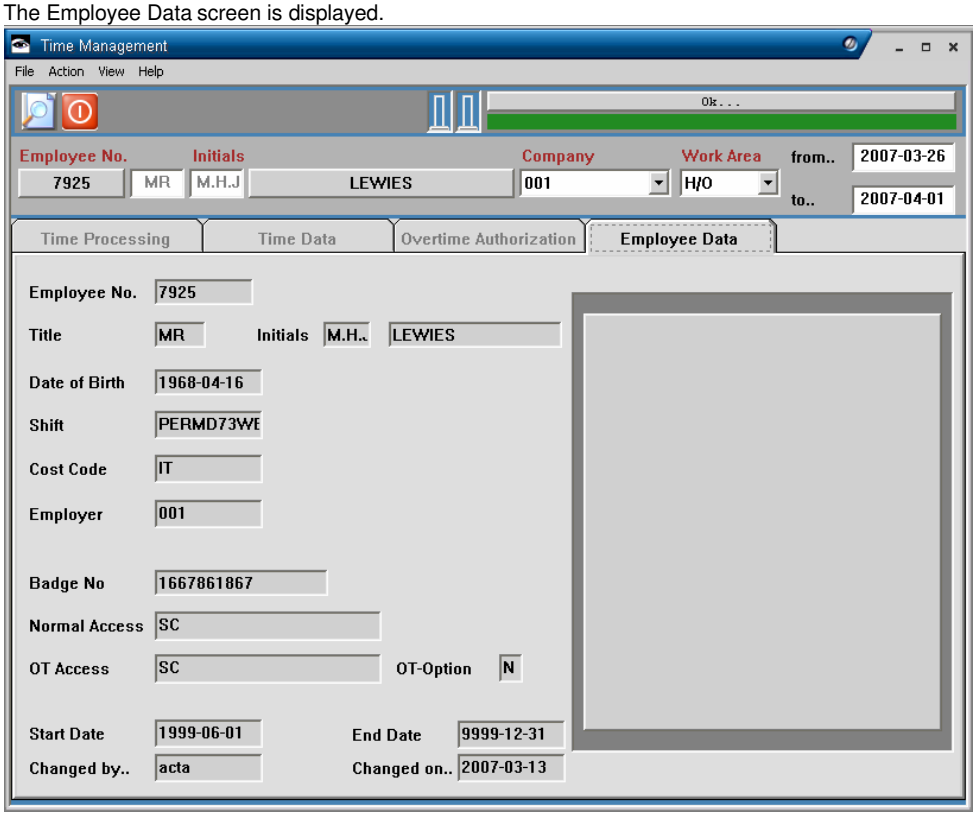
Menu Path

Follow the procedure below to display employee data:

- Employees can be selected with both Company ID and Surname as search criteria.
- Select the Search button.

Initial Screen

The Employee Data screen is displayed.



7 TIME CONFIGURATION

Procedures

Time configuration window consists of:

- Adding, Deleting and editing of business rules. These rules determine the result as generated by the Time Management process.
- Configuring of payroll export definitions i.e. format and layout of export file, as well as the location where the file is created.

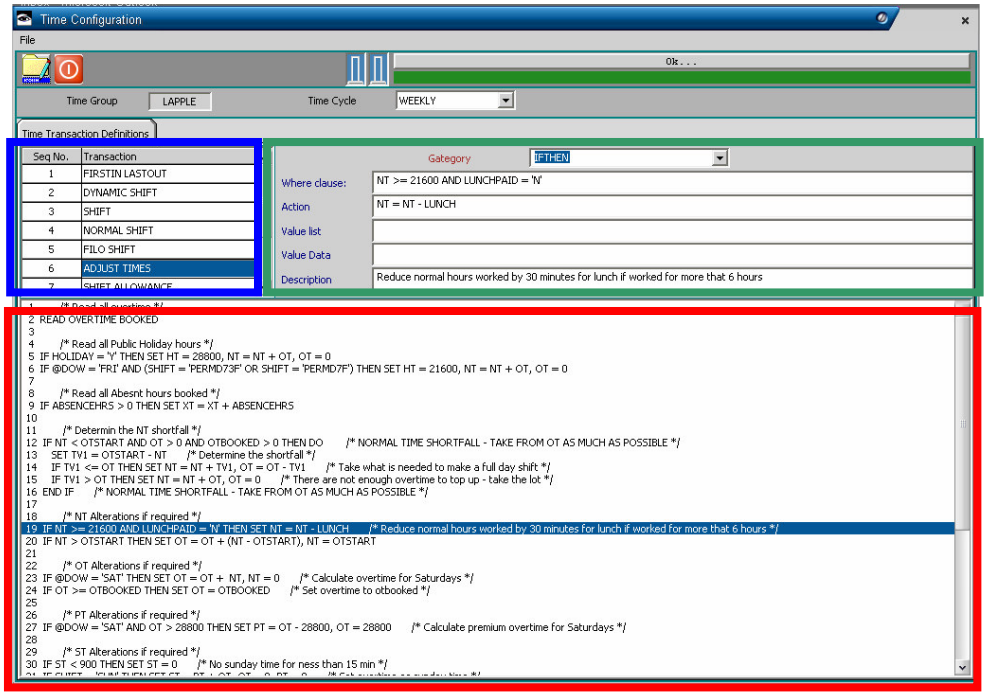
Menu Path

Follow the procedure below to edit the different categories:

- Verify that the Time group field is filled, and Time cycle is selected. Select the Search button from the button bar.
- When the search is complete, notice that the Transaction list is now filled as indicated in the **blue block** below.
- Select a Transaction from the Transaction step list.
- After the selection is complete, notice that the list of time rules displayed in the Transaction Detail page as indicated in the **red block** below.
- Selecting any time rule from the list indicated will allow you to edit, delete, promote, demote or copy the step/s.
- To add or edit a step, you must use the step detail section as indicated in the green block below.
- After a change is made the Save icon must be selected to save the change made.

Initial Screen

The Time Configuration screen is displayed.


Time Configuration
File
Time Group
LAPPLE
Time Cycle
WEEKLY
Time Transaction Definitions
Seq No.
Transaction
1 FIRSTIN LASTOUT
2 DYNAMIC SHIFT
3 SHIFT
4 NORMAL SHIFT
5 FILO SHIFT
6 ADJUST TIMES
Gategory
IFTHEN
Where clause:
NT >= 21600 AND LUNCHPAID = 'N'
Action
NT = NT - LUNCH
Value list
Value Data
Description
Reduce normal hours worked by 30 minutes for lunch if worked for more that 6 hours
2 READ OVERTIME BOOKED
4 /* Read all Public Holiday hours */
5 IF HOLIDAY = 'Y' THEN SET HT = 28800, NT = NT + OT, OT = 0
6 IF @DOW = 'FRI' AND (SHIFT = 'PERMD73F' OR SHIFT = 'PERMD7F') THEN SET HT = 21600, NT = NT + OT, OT = 0
8 /* Read all Absnt hours booked */
9 IF ABSENCEHRS > 0 THEN SET XT = XT + ABSENCEHRS
11 /* Determin the NT shortfall */
12 IF NT < OTSTART AND OT > 0 AND OTBOOKED > 0 THEN DO /* NORMAL TIME SHORTFALL - TAKE FROM OT AS MUCH AS POSSIBLE */
13 SET TV1 = OTSTART - NT /* Determine the shortfall */
14 IF TV1 <= OT THEN SET NT = NT + TV1, OT = OT - TV1 /* Take what is needed to make a full day shift */
15 IF TV1 > OT THEN SET NT = NT + OT, OT = 0 /* There are not enough overtime to top up - take the lot */
16 END IF /* NORMAL TIME SHORTFALL - TAKE FROM OT AS MUCH AS POSSIBLE */
18 /* NT Alterations if required */
19 IF NT >= 21600 AND LUNCHPAID = 'N' THEN SET NT = NT - LUNCH /* Reduce normal hours worked by 30 minutes for lunch if worked for more that 6 hours */
20 IF NT > OTSTART THEN SET OT = OT + (NT - OTSTART), NT = OTSTART
22 /* OT Alterations if required */
23 IF @DOW = 'SAT' THEN SET OT = OT + NT, NT = 0 /* Calculate overtime for Saturdays */
24 IF OT >= OTBOOKED THEN SET OT = OTBOOKED /* Set overtime to otbooked */
26 /* PT Alterations if required */
27 IF @DOW = 'SAT' AND OT > 28800 THEN SET PT = OT - 28800, OT = 28800 /* Calculate premium overtime for Saturdays */
29 /* ST Alterations if required */
30 IF ST < 900 THEN SET ST = 0 /* No sunday time for ness than 15 min */

8 REPORTS

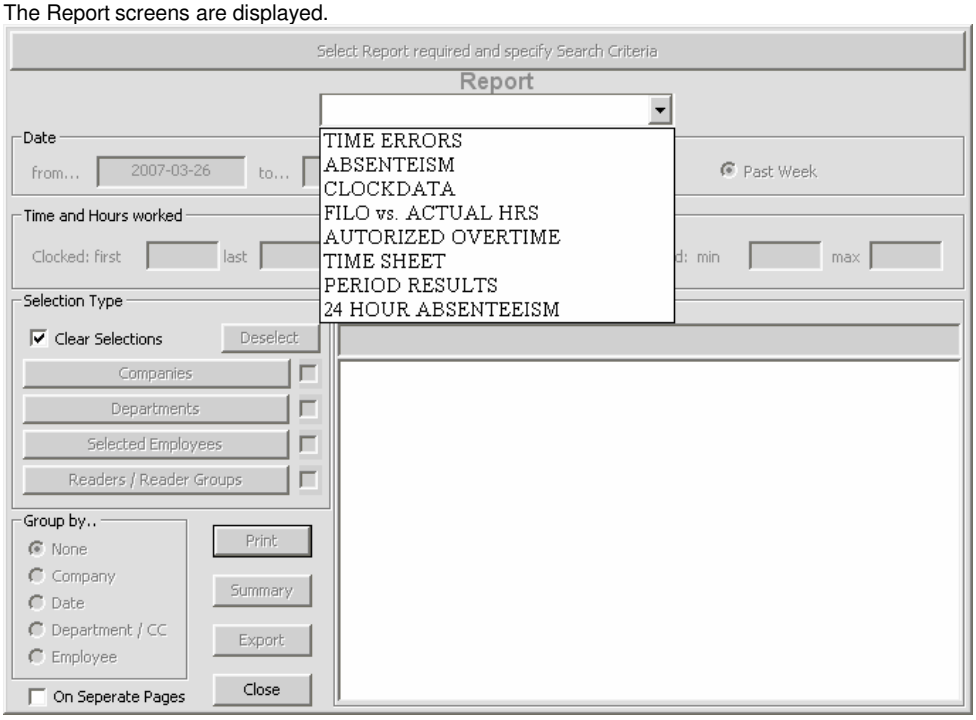
Menu Path

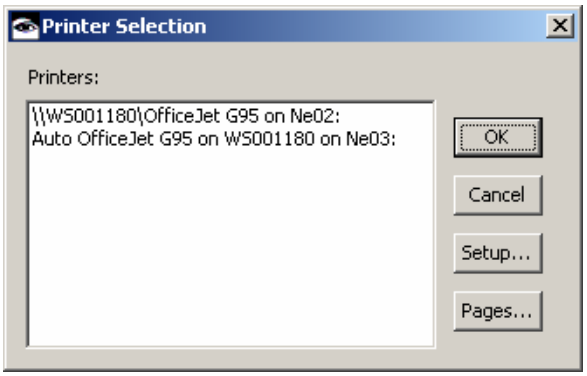
Follow the procedure below to run Reports:

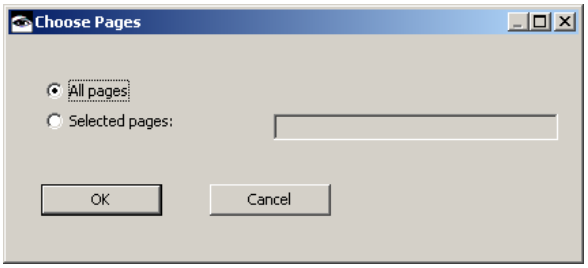
- Select the Reports button
- Select a Report from the Report drop down list.

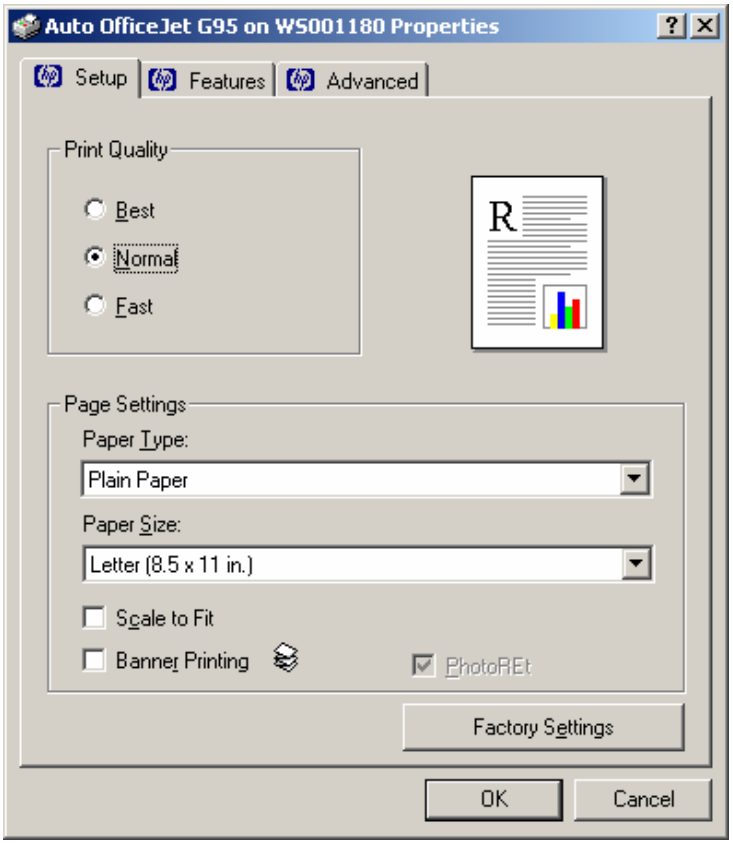
The Report screens are displayed.

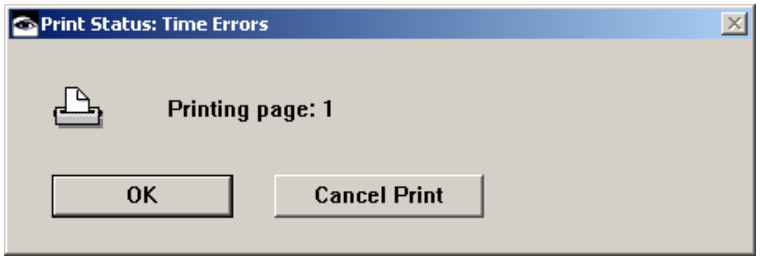
Initial Screen








Auto OfficeJet G95 on WS001180 Properties
Setup
Features
Advanced
Print Quality
Best
Normal
Fast
Page Settings
Paper Type:
Plain Paper
Paper Size:
Letter (8.5 x 11 in.)
Scale to Fit
Banner Printing
PhotoREt
Factory Settings
OK
Cancel


Print Status: Time Errors
Printing page: 1
OK
Cancel Print

8.1 TIME ERRORS REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Select one or more employees.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

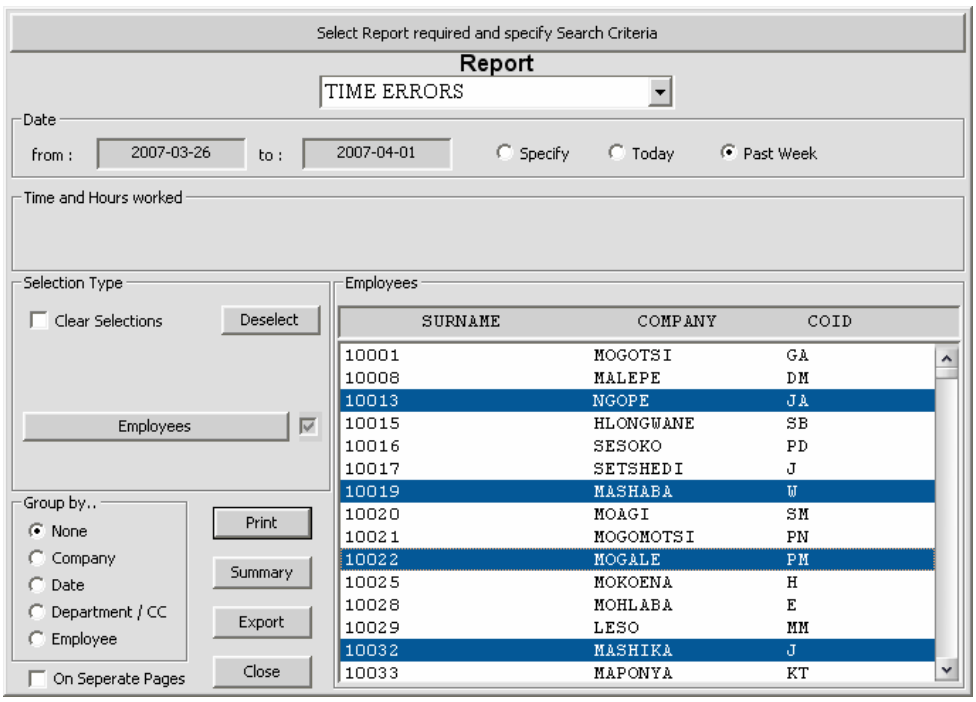
Menu Path

Follow the procedure below to display employee data:

- Select the Time Errors report from the dropdown list.
- Click the Employees button if only specific employees are to be selected.
- Press and hold the control button and select the employees as desired.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The Time Errors report screen is displayed.



8.2 ABSENTEEISM REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Specify an in and out clock time (with 00:00:00).
- Specify minimum or maximum hours worked (with 1 – 24).
- Perform company selections.
- Perform department selections.
- Perform employee selections.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

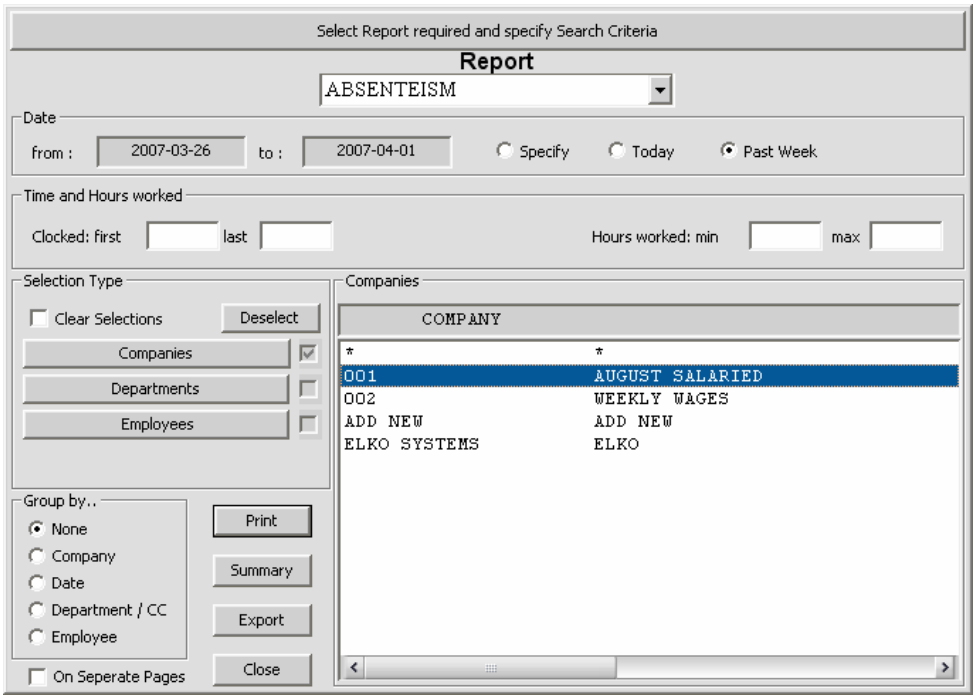
Menu Path

Follow the procedure below to display employee data:

- Select the Absenteeism report from the dropdown list.
- Select today to specify today's date.
- Select Specify to choose any date required.
- Click in the Clock first field and type (00:00:00) or click in the Clock last field and type (00:00:00).
- Click on the Companies and select the company required and/or click on the Departments and select the Department required and/or click the Employees button if only specific employees are selected, while holding down the control key.
- In the "Group by…" Group box select the Company, Date, Department or Employee to group the data to be printed accordingly.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The Absenteeism report screen is displayed.



8.3 CLOCKDATA REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Specify an in and out clock time (with 00:00:00).
- Perform employee selections.
- Perform reader selections.
- Select an employee or employees.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

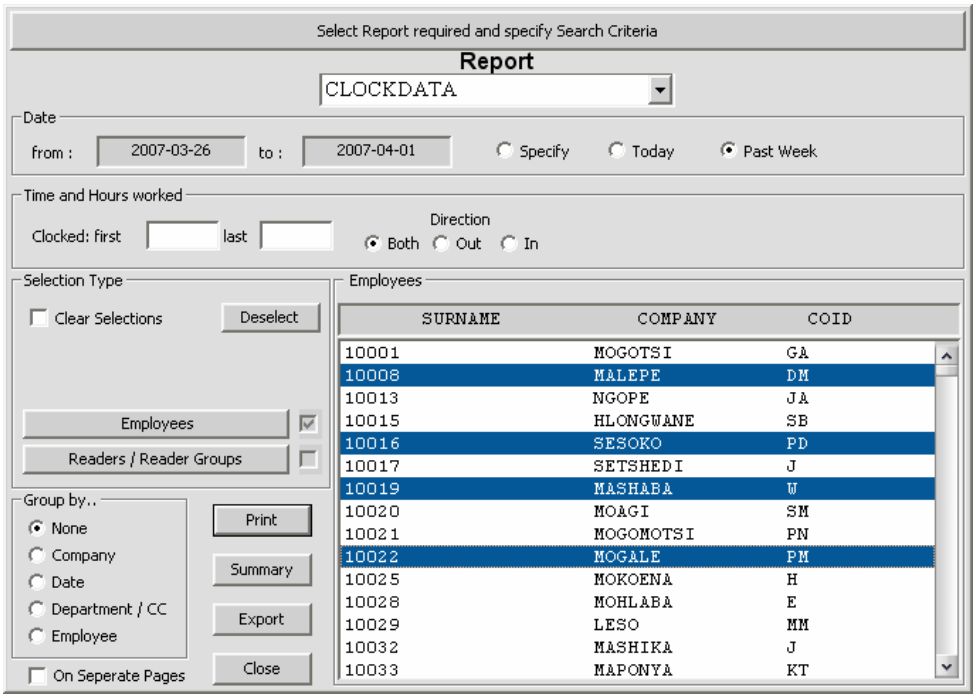
Menu Path

Follow the procedure below to display employee data:

- Select the Clock data report from the dropdown list.
- Select Today to specify today's date.
- Select Specify to choose any date required.
- Click in the Clock first field and type (00:00:00) or click in the Clock last field and type (00:00:00).
- Click on the Employees button and select the Employee or Employees while holding down the control key.
- Click on the Reader button and select the reader or readers while holding down the control key.
- Select the Print button to print the report
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The Clock data report screen is displayed.



8.4 FILO VS. ACTUAL HRS REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Perform company selections.
- Perform department selections.
- Perform employee selections.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

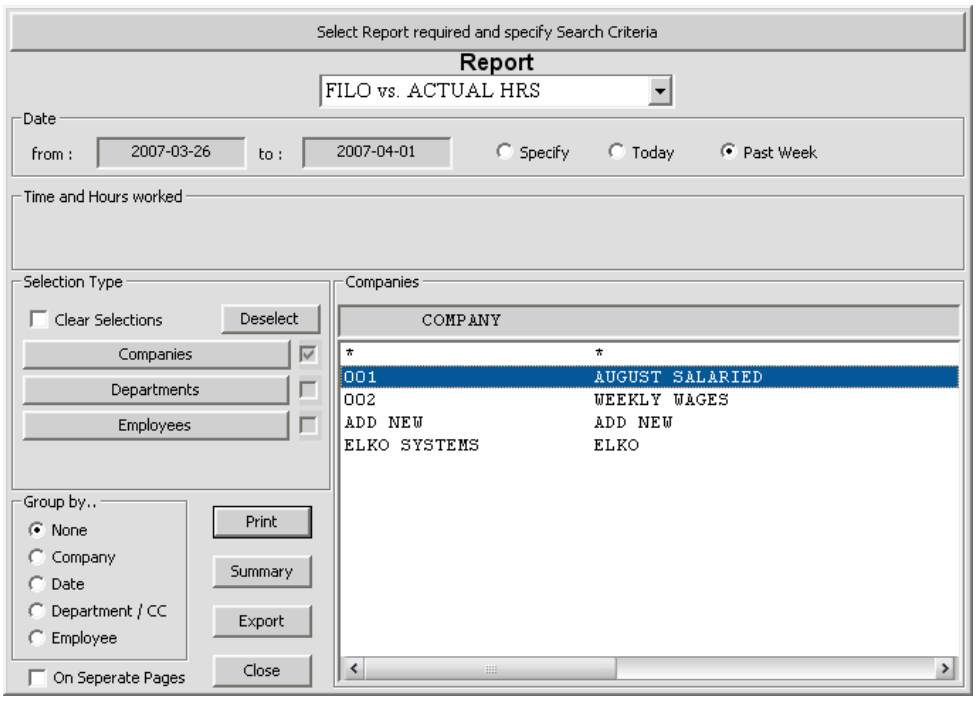
Menu Path

Follow the procedure below to display employee data:

- Select the FILO vs. Actual Hrs report from the dropdown list.
- Select Today to specify today's date.
- Select Specify to choose any date required.
- Click on the Companies button and select the company required and/or click on the Departments button and select the Department required and/or click on the Employees button and select the Employee or Employees while holding down the control key.
- In the "Group by…" Group box select the Company, Department, Date, or Employee to group the data to be printed accordingly.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The FILO vs. Actual Hrs report screen is displayed.



8.5 AUTHORIZED OVERTIME REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Perform company selections.
- Perform department selections.
- Perform employee selections.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

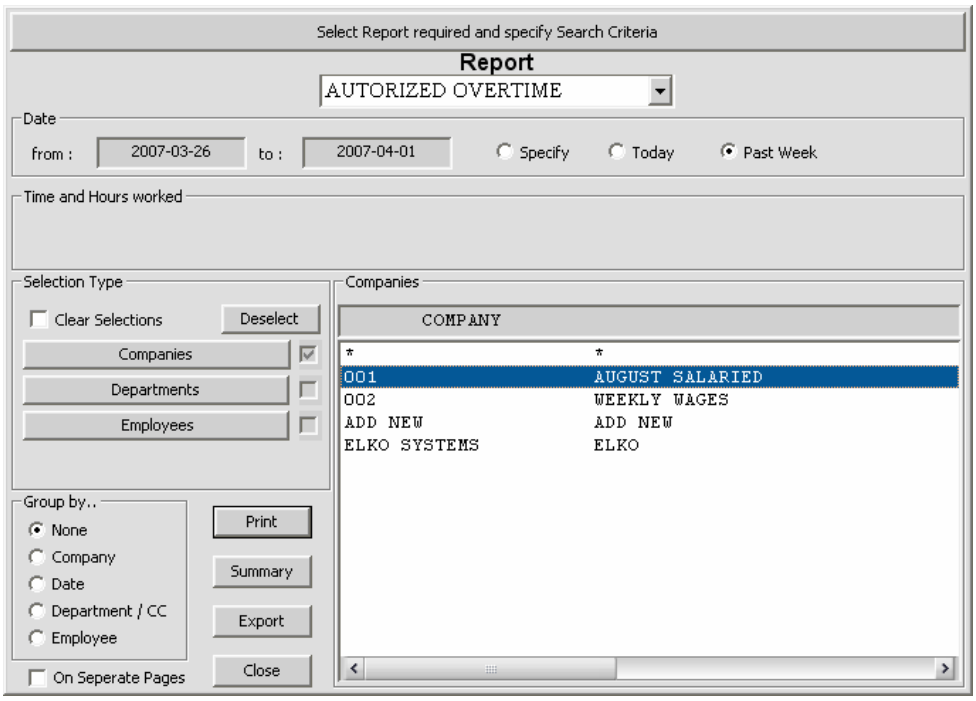
Menu Path

Follow the procedure below to display employee data:

- Select the Authorized overtime report from the dropdown list.
- Select Today to specify today's date.
- Select Specify to choose any date required.
- Click on the Companies button and select the company required and/or click on the Departments button and select the Department required and/or click on the Employees button and select the Employee or Employees while holding down the control key.
- In the "Group by…" Group box select Company, Department, Date or Employee to group the data to be printed accordingly.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The Authorized overtime report screen is displayed.



8.6 TIME SHEET REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Perform company selections.
- Perform department selections.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

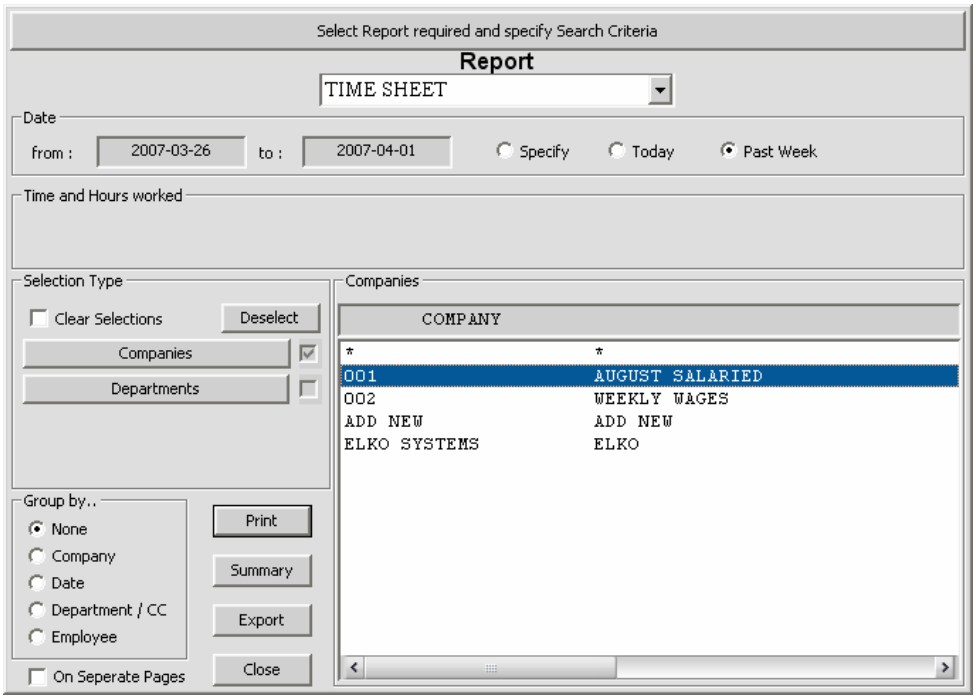
Menu Path

Follow the procedure below to display employee data:

- Select the Time sheet report from the dropdown list.
- Select Today to specify today's date.
- Select Specify to choose any date required.
- Click on the Companies button and select the company required and/or click on the Departments button and select the Department required and/or click on the Employees button and select the Employee or Employees while holding down the control key.
- In the "Group by…" Group box select Company, Department, Date or Employee to group the data to be printed accordingly.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The Time Sheet report screen is displayed.



8.7 PERIOD RESULTS REPORT

Procedures

On this Report screen one can:

- Specify specific dates on which to run the report.
- Perform company selections.
- Perform department selections.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

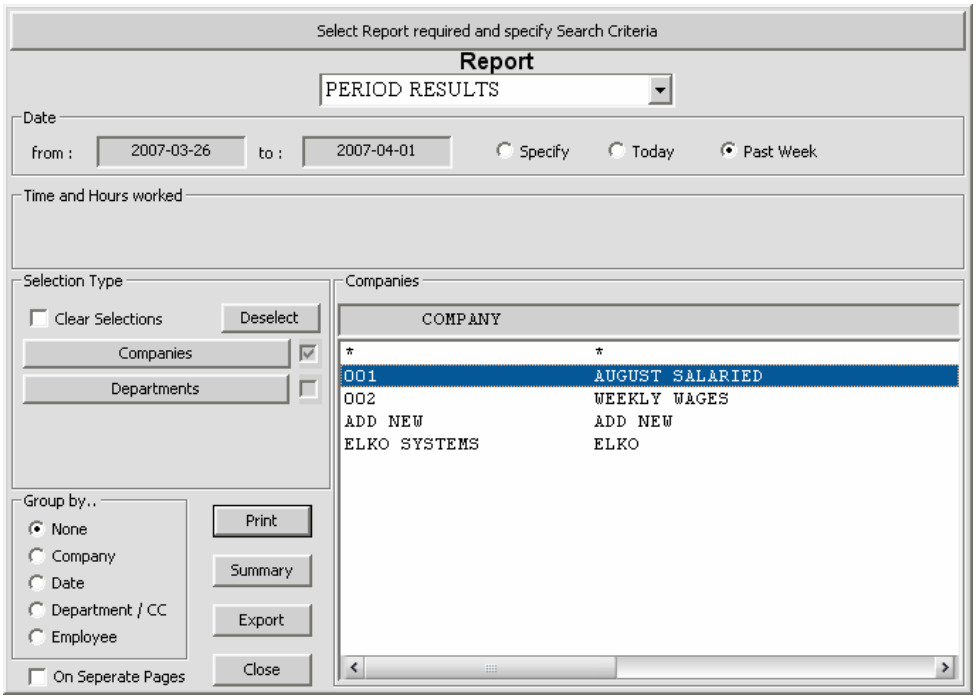
Menu Path

Follow the procedure below to display employee data:

- Select the Period Result report from the dropdown list.
- Select Today to specify today's date.
- Select Specify to choose any date required.
- Click on the Companies button and select the company required and/or click on the Departments button and select the Department required and/or click on the Employees button and select the Employee or Employees while holding down the control key.
- In the "Group by…" Group box select Company, Department, Date or Employee to group the data to be printed accordingly.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The Period Results report screen is displayed.



8.8 24 HOUR ABSENTEEISM

Procedures

On this Report screen one can:

- You should always specify a specific date on which to run the report.
- Perform company selections.
- Print the report or a summary report.
- Export the data to a comma delimited or excel file.

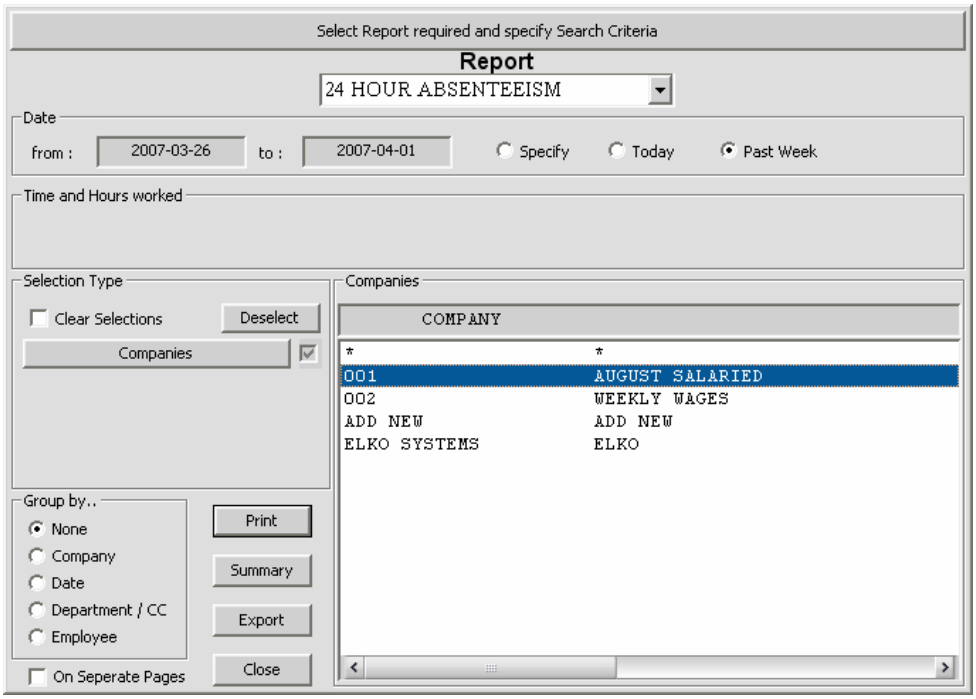
Menu Path

Follow the procedure below to display employee data:

- Select the 24 Hour Absenteeism from the dropdown list.
- Select Today to specify today's date.
- Select Specify to choose any date required.
- Click on the Companies button and select the company required and/or click on the Departments button and select the Department required and/or click on the Employees button and select the Employee or Employees while holding down the control key.
- In the "Group by…" Group box select Company, Department, Date or Employee to group the data to be printed accordingly.
- Select the Print button to print the report.
- Select the summary button to print a summary report.
- Select Export and choose a file name and save the file.
- Select close to Exit the Report Dialogue.

Initial Screen

The 24 Hour Absenteeism report screen is displayed.



9 ACTA OVERVIEW